Qualitative case study research design: the commonalities and differences between collective, intrinsic and instrumental case studies

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Abstract

Research design is concerned with procedures employed in a research paradigm. This article discusses literature on qualitative case study research design, and its related approaches. The article discusses case study approach and its sampling techniques, data gathering techniques and methods of data analysis. The article further points out the notion of trustworthiness including triangulation and its various forms. The advantages and disadvantages of case study are also discussed, and the article summarises the commonalities and differences between collective, intrinsic and instrumental case studies.

Keywords: data, approach, case, qualitative, research, trustworthiness, study, triangulation

Introduction

The qualitative case design is concerned with approaches such as ethnographic, grounded theory, mixed methods and case study; it is also concerned with data gathering techniques, tools and analysis, as well as ethical procedures and methods of ensuring research trustworthiness employed in the study (Bryman, 2008; Cohen et al., 2011; Mutch, 2005). An ethnographic study is undertaken with a smaller unit or group, which is representative of a larger group, where the study's findings illustrate a larger picture. Also, the ethnographic researcher becomes part of the study group and undertakes the activities. The aim of grounded theory research is to generate theory, while a mixed method approach utilizes qualitative and quantitative approaches to enhance the trustworthiness of findings.

Case study approach

Case study has many definitions. According to Johnson and Christensen (2008), "a case [study] is defined as a bounded system" (p. 406). A "system" consists of many interrelated parts of a whole setting or organization, while "bounded" means the identification of a part or an element of that organization and its boundaries to study (Bryman, 2008; Creswell, 2007; Johnson & Christensen, 2008, 2012; Merriam, 1998; Punch, 2009; Yin, 1994, 2003). The definition of a bounded system is further expanded by Gillham (2000): A case can be an individual; it can be a group – such as a family, or a class, or an office, or a hospital ward; it can be an institution – such as a school or a children's home, or a factory; it can be a large-scale community – a town, an industry, a profession. (p. 1). Yin (1994) defines "a case study [as] an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident" (p. 13). According to Ary et al., (2002), "A case study is an in-depth study of a single unit, such as one individual, one group, one organization, one program, and so on" (p. 27). Bryman (2008) notes that a "case study entails the detailed and intensive analysis of a single case" (p. 52). These definitions clearly illustrate that a case study provides in-depth data and a whole or complete picture of real-life actions of human beings in a social activity in a particular natural setting (Punch, 2009).

The case study approach is a suitable means of obtaining answers because of its three distinctive features - "particularistic, descriptive and heuristic" which differentiate it from other types of research (Merriam, 1998, 29-30). The following is a description of those distinctive features. 'Particularistic' refers to specific

contexts, programmes, events and phenomena of everyday actions of people. Thus, case study focuses on specific phenomena human beings undertake, experience and represent the problem or issue as it presents itself. 'Descriptive' relates to the final outcome or 'end product' of case studies, which often contain "rich, thick descriptions of the phenomena under study" (Merriam, 1998, 29). Thick descriptions mean that complete and actual data of participants are presented in the case study, where meanings are drawn on the basis of that data. "Heuristic means that case studies illuminate the reader's understanding of the phenomena under study" (Merriam, 1998, 30). This is where the readers make sense of meanings of the findings to confirm or disagree by relating to their life experiences, often called the 'inferential bridge' of the phenomena studied.

Qualitative methods

Qualitative research methods are applied to unveil the direct actions and experiences of human beings in a social activity they undertake (Bryman, 2008; Mutch, 2005). Interpretive case studies are ideally undertaken in natural settings without manipulating the participants, and the meanings are drawn from the perspectives of participants (Cohen et al., 2011; Lincoln & Guba, 1985; Neuman, 2007) in order to present a complete picture of a particular social setting (Creswell, 2009; Lincoln & Guba, 1985).

Qualitative strategies, such as interviews, observations and examination of documentation, are used to gather rich descriptive data of lived experiences of the participants and their direct actions associated with experiences in order to enhance understanding of the particular situation of the study inquiry (Burns, 2000; Mutch, 2005). These qualitative methods deal with data in the form of words, texts and documents (Ary et al., 2002; Bryman, 2008; Cohen et al., 2011; Denzin & Lincoln, 2003; Johnson & Christensen, 2008). Qualitative methods are valuable because they "view human behaviour as dynamic and changing, and… advocate studying phenomenon in depth and over an extended period of time" (Johnson & Christensen, 2008, 388). Inductive reasoning processes are typically used to analyse data (Ary et al., 2002; Bryman, 2008; Cohen et al., 2011; Glaser, 1978, 1992, 1994; Glaser & Strauss, 1967). An iterative process occurs when:

> *Researchers build their patterns, categories, and themes from the bottom up, by organizing the data into increasingly more abstract units of information. This inductive process illustrates working back and forth between the themes and database until the researchers have established a comprehensive set of themes* (Creswell, 2009, 175).

The researcher frequently becomes part of the social setting and shares the feelings and experiences of the participants' daily lives in social activities (Bryman, 2008; Cohen et al., 2011; Lincoln & Guba, 1985; Neuman, 2000). Integrity is maintained by the researcher following protocols, such as when seeking consent from the participants, and by maintaining mutual understanding and positive relationships with the participants throughout the study (Ary et al., 2002; Bryman, 2008; Lincoln & Guba, 1985; Punch, 2009). The findings contain original verbatim data from the participants for trustworthiness. Trustworthiness refers to the overall processes or methods applied in the study inquiry, in terms of truth, validity and reliability of accounts. Trustworthiness in interpretive studies requires the issues of *credibility, transferability, dependability* and *conformability* to be considered (Bryman, 2008; Cohen et al., 2011; Lincoln & Guba, 1985; Neuman, 2000). This kind of study employ qualitative methods or techniques to investigate the national outcome-based curriculum implementation in PNG.

Data gathering techniques

Data gathering techniques are ways of gathering data from the participants in the field to answer research questions (Johnson & Christensen, 2012). As discussed previously, the case study approach was used for data collection in this research to keep data manageable for a single researcher. Within the case study approach, typical qualitative data gathering strategies or methods include interviews, observations and

document analysis (Burton & Batlett, 2005; Lincoln & Guba, 1985; Mutch, 2005; Punch, 2009). These qualitative methods are described in turn.

Interviews

An interview is a special form of communication that occurs between the researcher and the interviewee/s to collect verbal and non-verbal data about a particular issue in interpretive studies (Lincoln & Guba, 1985; Punch, 2009). The interview is a flexible strategy for obtaining qualitative data, which provides opportunity for an interviewee to verbally express his or her thoughts, feelings, experiences, views, opinions and offer suggestions about the issue being studied (Cohen et al., 2011; Mutch, 2005; Wallen & Fraenkel, 2001, 2005; Yin, 1994). The interviewer's main role is to ask questions or facilitate discussions for the interviewees to respond to or answer, while notes are taken or tape-recorded as the conversation naturally proceeds (Bryman, 2008; Wallen & Fraenkel, 2001, 2005).

There are three types of interviewing techniques used in interpretive case studies: structured, semi-structured and unstructured (Bryman, 2008; Lincoln & Guba, 1985; Punch, 2009; Yin, 1994). A structured interview refers to "a series of pre-established questions, with pre-set response categories [where] … open-ended questions may sometimes be used" (Punch, 2009, 146), while a semi-structured interview is related to a set of general questions, which are uncategorised and guide the interviewer in interview conversations (Bryman, 2008, 196). An unstructured interview refers to an interview schedule, which does not have a set of questions but may contain a list of topics or issues or prompts related to the nature of the study to guide the interview conversations (Bryman, 2008; Cohen et al., 2011; Lincoln & Guba, 1985; Punch, 2009).

Interviews are used to "explore people's interpretations and meanings of events and situations, and their symbolic and cultural significance" (Punch, 2009, 148). Structured and unstructured interviewing techniques often apply on a one-on-one basis or in a focus group to gather data (Bryman, 2008; Punch, 2009). A one-on-one interview is a discussion that takes place between a single participant and the researcher, while a focus-group interview is undertaken by the researcher with more than one person in a group (Bryman, 2008; Punch, 2009).

Observations

Observations involve collecting qualitative information about human actions and behaviours in social activities and events in a real social environment, such as classroom teaching and learning (Cohen et al., 2011; Mutch, 2005; Neuman, 2007; Wallen & Fraenkel, 2001). There are two main observation strategies: participant observation and non-participant observation (Bryman, 2008; Cohen et al., 2011; Johnson & Christensen, 2012; Yin, 1994). Participant observation occurs when the researcher becomes part of the group under study and participates in everyday social activities of that social system to obtain the actual feelings and experiences of the phenomena, while at the same time taking notes of the actions and behaviours of the participants. Data are often audio recorded, too. The observer as a participant can inform the participants of the study about his or her participation in the social activity (Cohen et al., 2011; Johnson & Christensen, 2012).

In contrast, qualitative data gathered using a non-participant observation technique involves the researcher sitting or standing on the side while social activities like teaching and learning are taking place (Bryman, 2008; Cohen et al., 2011; Johnson & Christensen, 2012; Wallen & Fraenkel, 2001), Data can be obtained via notetaking or digitally, for example, using a video recorder (Cohen et al., 2011; Johnson & Christensen, 2012). A video camera can be used as non-participant observer because the "video material catches the non-verbal data that audio recordings cannot, which may be particularly useful … in detailed case study data collection … [of] everyday routines and practices of participants and special events" (Cohen et al., 2011, 530-531). In other words, the video recorder can record human behaviour, actions, verbal language

and interactions in a social activity the participants undertake, as well as the physical organisational settings and structures (Best & Kahn, 2006).

Document analysis

The word 'document' is defined as "any written or recorded statement" (Lincoln & Guba, 1985, 277). Analysing documents is a form of collecting qualitative information from a primary or original source of written, printed or recorded materials to answer research questions in interpretive case studies (Creswell, 2009; Lincoln & Guba, 1985; Punch, 2009; Wallen & Fraenkel, 2005; Yin, 1994). The documents provide evidence of authentic or real activities undertaken by human beings in social organisations and human thinking (Lincoln & Guba, 1985; Yin, 1994). According to Punch (2009), "documents, both historical and contemporary, are a rich source of data for education and social research" (p. 158). Documents may include letters, plans, models, daily operational schedules, personal diaries, reports and photographs of activities (Lincoln & Guba, 1985; Punch, 2009). The descriptions above present typical qualitative data gathering methods that researchers employ in unveiling human behaviour and actions in a social activity.

Sampling techniques

Sampling means to set a limit or define a specific sub-unit, sub-group or subset of a larger unit, group, population or organisation under study to make the study manageable (Ary et al., 2002; Basit, 2010; Best & Kahn, 2006; Cohen et al., 2011; Flick, 2007; Johnson & Christensen, 2012). A larger group is often not sampled in educational studies because of limiting factors like time, expense, and accessibility to the study sites (Best & Kahn, 2006; Neuman, 2000). When sampling smaller groups for data, it is important that the sample is as representative of the larger population of the study topic as possible (Bryman, 2008; Cohen et al., 2011; Johnson & Christensen, 2008, 2012). When making decisions about sampling the researcher needs to consider four key factors:

- appropriateness of the sampling strategy used.

- appropriateness of sampling size.

- representativeness of the population and the boundary of sampling; and

- accessibility to the participants (Best & Kahn, 2006; Cohen et al., 2011; Johnson & Christensen, 2008, 2012).

Qualitative studies often apply purposive sampling to select the participants to gather field data from (Cohen et al., 2011; Johnson & Christensen, 2008, 2012) and gain access to specific research participants who possess relevant experience and knowledge for the study topic, and who are in a position to give a primary source of data (Cohen et al., 2011). Teddlie and Yu (2007) define purposive sampling as "selecting units (e.g., individuals, groups of individuals, institutions) based on specific purposes associated with answering a research study's questions" (p. 77). Such sampling facilitates the research questions by drawing out the expertise, experiences, knowledge, views, perceptions, opinions and suggestions of a specific group of people who engage in a social activity (Creswell, 2007; Johnson & Christensen, 2012). It is important to note that the findings of qualitative studies that utilise purposive sampling cannot be generalised to a larger population, but they can be compared (Neuman, 2000). The next section describes how the trustworthiness or quality of a research project is addressed.

Trustworthiness of research

This section discusses the notion of trustworthiness in research including the triangulation in its various forms (Lincoln & Guba, 1985). Trustworthiness refers to the strength or truth, and value or merit of the

study's findings (Cohen et al., 2011; Lincoln & Guba, 1985). The findings of a study possessing trustworthiness can be trusted, because the study shows truthful accounts and is meritorious. Trustworthiness is related to considerations of the whole research inquiry process, including the theories that underpin the study, the research design, methodological approach, data gathering strategies, data analysis techniques, ethical approaches and the findings of the study (Cohen, 2007; Lincoln & Guba, 1985; Mutch, 2005). Triangulation refers to the multiple applications of data gathering techniques, sources of data and analysis of findings (Lincoln & Guba, 1985), and it contributes to trustworthiness. Triangulation increases the trustworthiness of the study inquiry by providing rich and detailed data not from a single source but from many sources of human behaviour and actions in the same study and through various methods (Cohen et al., 2011; Lincoln & Guba, 1985; Neuman, 2000; Patton, 2002). Trustworthiness in qualitative research requires consideration of issues of "credibility, transferability, dependability and confirmability" (Lincoln & Guba, 1985, 300) of the study. These issues are now discussed in turn.

Credibility

Credibility refers to the belief or confidence in a study that authentic or correct guidelines and approaches were considered by the researcher/s and subsequently employed in data gathering, analysis and reporting of the findings (Lincoln & Guba, 1985; Silverman, 2010). Credibility can be enhanced when the participants verify and approve the data as well as interpretations of the study findings (Lincoln & Guba, 1985). The verification and approval processes involve the researcher spending long hours repetitively going back and forth to get the participants' approval of their own constructed multiple realities (Cohen et al., 2011; Lincoln & Guba, 1985). Triangulation of methods also refines and reduces the data that are obtained when grouped under research questions (Bryman, 2008; Cohen et al., 2011; Lincoln & Guba, 1985; Silverman, 2010). The reduction of data relates to the continuous process of refining the data by sorting, re-sorting, grouping, re-grouping, categorising and re-categorising until the data are fit to answer the research questions (Bryman, 2008; Cohen et al., 2011; Lincoln & Guba, 1985).

Transferability

Transferability refers to the study's finding being useful for others so they can make judgments and transfer to other similar social environments (Lincoln & Guba, 1985; Silverman, 2010). Transferability is facilitated when the study provides "thick description necessary to enable someone interested in making a transfer to reach a conclusion about whether transfer can be contemplated as a possibility" (Lincoln & Guba, 1985, 316). Such data will contain unique and significant information of a particular social environment, where others can make 'inferential bridges' by relating to their own experiences and activities (Bryman, 2008).

Dependability

Dependability and credibility are interdependent. Lincoln and Guba (1985) proposed that "there can be no ... credibility without dependability, a demonstration of the former is sufficient to establish the latter" (p. 316). This statement shows that dependability is the stage of being certain or sure about the study's findings without doubt and that it can be relied upon (Cohen et al., 2011; Lincoln & Guba, 1985). The study's findings have value, and other researchers can refer to similar situations (Best & Kahn, 2006; Lincoln & Guba, 1985; Silverman, 2010).

Confirmability

Confirmability means the study findings have been accurately and fairly presented without bias by following the required study standards and requirements from the initial stages to the final stages of the study project (Bryman, 2008; Creswell, 2009; Punch, 2009). In qualitative case studies the researcher also

communicates the findings of the study to the participants to verify the meanings interpreted and confirm the data (Cohen et al., 2011). This process involves an 'audit approach,' where data are constantly being scrutinised and changes are recorded and tracked in an ongoing process, which leads to confirmation of the data (Bryman, 2008; Lincoln & Guba, 1985).

Triangulation and its various forms

Triangulation involves looking "at something from several angles rather than to look at it in only one way" (Neuman, 2000, 124). It occurs when two or more strategies of data gathering and/or sources of data are used to illustrate an authentic picture of a phenomenon under study (Cohen et al., 2011; Hitchcock & Hughes, 1995; Lincoln & Guba, 1985; Patton, 2002; Silverman, 2010). Four types of triangulations are recognised: data triangulation; triangulation of observer; triangulation of method; and triangulation of theory.

Data triangulation refers to multiple data that are gathered from more than one place, with many participants, over a longer period of time, to see the reality, while triangulation of observer concerns many researchers and their observations of the same phenomenon of the study. Triangulation of method is the use of two or more strategies to gather data on the same issue or topic, and triangulation of theory employs more than one theoretical perspective in data interpretation and analysis to generate concepts, ideas and categories (Cohen et al., 2011; Lincoln & Guba, 1985; Neuman, 2000; Patton, 2002).

Inter-subjectivity

In qualitative educational research, inter-subjectivity is of paramount importance for a high-quality study. Inter-subjectivity relates to the personal experiences a qualitative researcher encounters in undertaking research (Lincoln & Guba, 1985; Newby, 2010) when he/she acts as an instrument and draws knowledge from the participants (Lincoln & Guba, 1985; Neuman, 2000). In this role, the researcher gathers the data by him or herself through interacting face-to-face with the participants and physically observing their behaviour and actions in real social worlds (Lincoln & Guba, 1985; Newby, 2010). This function has value in qualitative research because "the human-as-instrument can sense and respond to all personal and environmental cues that exist" (Lincoln & Guba, 1985, 193).

Since research involves people, the researcher must endeavour to create mutual understanding and a healthy relationship in his or her daily interactions with the participants (Lindsay, 2010; Matthews & Ross, 2010; Newby, 2010). As the researcher integrates with the participants, any power relationship is flattened, and the researcher becomes one of the participants and agrees to uphold the culture, values, beliefs and norms of that organisation or society the people belong to, in order to unveil the knowledge (Bryman, 2008; Lindsay, 2010; Matthews & Ross, 2010).

Additionally, inter-subjectivity concerns the whole research process, including the theories that guide the study, methodological approaches, data collection techniques and considerations, analysis of findings, and relationships between the researcher and the participants (Lincoln & Guba, 1985; Mutch, 2005). When the findings are triangulated, the study becomes more credible. This is when the research and the participants establish a better relationship to confirm credible data is obtained (Cohen et al., 2011; Lincoln & Guba, 1985). Further, applying correct procedures and techniques to analysis of qualitative data adds trustworthiness to the study, and this is described in the next section.

Data analysis

Qualitative case studies can employ a number of different techniques to generate knowledge from the qualitative data. Each technique used needs to be systematically and explicitly described for high quality research findings (Berg, 2007; Matthews & Ross, 2010; Newby, 2010; Sarantakos, 2005). Qualitative data

of human activities obtained in the form of audiotapes, videotapes and documents are frequently analysed using inductive reasoning processes in interpretive case studies (Cohen et al., 2011; Creswell, 2007; Glaser, 1992; Glaser & Strauss, 1967). An inductive reasoning of data analysis involves constantly moving back and forth from data to data to generate reality related to the research questions.

Qualitative data can be inductively examined by the researcher/s in two ways: the first, using interpretive criteria to compare and contrast the phenomena under study, and the second, semantics to gain insights into the language meanings and human behaviour and actions (Berg, 2007). Interpretive criteria are concerned with data being interpreted and analysed from the perspectives of the participants, using systematic and explicit rules (Cohen et al., 2011; Creswell, 2007; Maykut & Morehouse, 1994), while semantics means the data are interpreted and analysed by relating and listening to the meaning of words, phrases, sentences and paragraphs to better understand from the perspectives of the participants in that particular socio-cultural context (Sarantakos, 2005).

Qualitative case studies generate "huge amounts of data, and early analysis reduces the problem of data overload by selecting out significant features of future focus" (Cohen et al., 2007, 462). Thus, a continuous thorough reading, re-reading, sifting, re-sifting, sorting, re-sorting, grouping, and re-grouping of the data is required to gain understanding of the salient features of the particular situation being studied (Bryman, 2008; Cohen et al., 2011). Once the data are organised and coded and re-coded to generate units of meaning, categories, and themes many times, the inductive analysis processes facilitate development of theory that fits the particular situation under investigation (Best & Kahn, 2006; Cohen et al., 2011; Glaser, 1978, 1992, 1994; Glaser & Strauss, 1967; Matthews & Ross, 2010; Newby, 2010; Patton, 2002; Sarantakos, 2005). A theory is a set of ideas or explanations that emerges or arises from the re-coded data of the study.

Advantages and disadvantages

The case study has advantages and disadvantages, or limitations (Merriam, 1998). Some of the advantages are the following: the actual practices of people undertaking activities in a particular setting or settings are unique and a case study can unveil complex human interactions, experiences and everyday life activities; blends description of events with analysis of findings; and presents the findings for the readers to understand and relate their experiences from other similar settings (Cohen et al., 2011; Merriam, 1998; Yin, 2003). In a collective case study, "several cases are compared for similarities and differences" (Johnson & Christensen, 2008, 408). By comparing and contrasting the cases, the researchers can understand the phenomena under study from within each case, and across cases (Merriam, 1998). Additionally, the findings of multiple case studies can be utilised by policy makers, like government departments to revisit policies to make informed decisions, and recommendations and suggestions can be put into practice by practitioners such as teachers to improve their teaching practices (Merriam, 1998).

The limitation of case studies is that the findings can be exaggerated or illustrate false information for a particular phenomenon under study. Furthermore, the lengthy and detailed findings of the study may be too long and time-consuming to be read by busy policy makers and practitioners. Additionally, time, money and other support resources, such as transport, can prevent some data collection (Cohen et al., 2011; Gillham, 2000; Merriam, 1998). In addition, the readers may believe that the findings of the study illustrate a whole social setting, when the findings only show a part of the whole social system. Moreover, the findings can be biased, such as when case studies are funded, as the researchers may manipulate the data to suit the needs and aspirations of the sponsor/s (Merriam, 1998).

Summary

Qualitative case study research design is best understood as a way of employing a set of procedures within a research paradigm to unveil or generate realities (Cohen et al., 2011; Maxwell, 2005). The literature shows that the case study approach is limited to a particular unit, group, or organization where the study unveils

the everyday experience of human beings and the study's findings present that particular setting. The differences between collective, intrinsic, and instrumental case studies are illustrated in Figure 1 below and are discussed in the following paragraph.
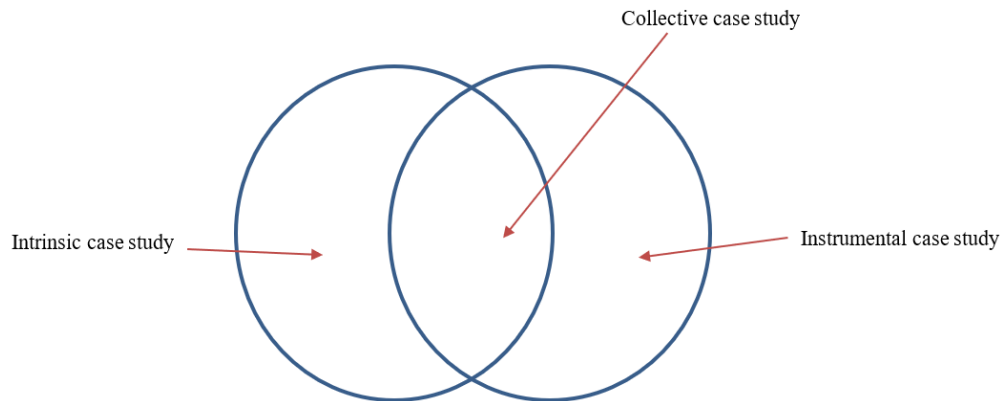

Figure 1 A framework illustrating the differences between collective, intrinsic and instrumental case studies

Three types of case studies can be identified as intrinsic, instrumental, and collective case studies, which are "distinguished by the size of the bounded case, such as whether the case involves one individual, several individuals, a group, an entire program, or an activity" (Creswell, 2007, p. 74). An intrinsic case study is undertaken with issues or problems that interest a researcher, to uncover and understand in detail a particular or specific case, while an instrumental case study involves exploring some general areas to understand rather than a particular case. A collective case study includes multiple case studies, which are undertaken in one or single research, to gain in-depth insights of the research topic (Creswell, 2007; Johnson & Christensen, 2008, 2012; Punch, 2009). In other words, "The first two [intrinsic and instrumental] of these are single case studies, where the focus is within the case. The third [collective] involves multiple cases, where the focus is both within and across cases" (Punch, 2009, 119). Thus, a collective case study includes or involves both intrinsic and instrumental cases.

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